

ABSTRACT

A method and system for investment integration. Investment managers, when managing an investment portfolio, are aided by a number of investment tools. Each tool performs a number of functions. As a manager selects the tools best suited for his or her sector of the investment industry he or she is faced with integrating these tools into one working system. The claimed invention provides a method and system for integrating and accessing these tools and functions. In one embodiment a method using an open architecture system allows disparate investment tools to communicate with each other real-time in a manner that is transparent to the investment manager. A central interface, using a user defined format, presents a variety of functions from a number of investment tools. This central interface allows a user to view data and result from a number of investment tools on a single interfaces as well as launching individual investment tools, populated with data that is integrated from the remaining tools. The user can design alerts to provide notification when certain criteria regarding investment parameters have been met. In one embodiment, an individual system of user defined investment tools can be coupled with other individually designed systems forming a network. In one embodiment, an application service provider serves as a host to the network allowing a user to indicate his or her willingness to offset an order with another user.